<u>Step-by-Step Instructions for sending Documents via Email to the Outgoing Correspondence Center (OCC) for the Energy Program</u>

Step 1: **Proof** your document to be sure it is accurate. Check addresses, list of attachments, and courtesy copy (cc) list. Be sure the courtesy copy recipient address is listed.

Step 2: **Save** your document as a .pdf and bronze it into OIS.

Step 3: **Code ECS.**

You will now make a packet for each addressee and cc recipient:
Step 4: **Merge** the transmittal and address sheet with the document to be mailed. Open the .pdf version of the document that you used to bronze it into OIS, use this version to merge. Put the document in the order you want it put in the envelope, with the transmittal sheet on top and the address sheet as the second document. (**See separate instructions on merging documents for centralized printing**)

> **NOTE:** If you have one authorized representative (AR) for multiple claimants on one case, you can merge the copies of the letters for the AR together and send as one print job. You'll need to identify how many letters are included for the AR in the special handling instructions of the Transmittal.

Step 5: **Complete an Outgoing Correspondence Center (OCC) Transmittal and address page** for **each** recipient. The remarks section on the Transmittal is used to identify special instructions such as "please send 2 copies of EE-4". Do not add cc: addresses in this section.

You may check a box on the Transmittal to send documents to international addresses, via UPS next day air, or via Certified/Priority mail. Certified and Priority mail are both trackable. The contract staff will determine which is most cost effective. **Note: addresses with a Post Office Box cannot be sent via UPS.**

Step 6: **Create** a folder on the H drive and save the merged documents in Adobe.

Step 7: **Re-check** each packet before you send the document to the OCC email group (<u>OWCP-Printer-Mail-DEEOIC</u>). Make sure it is accurate in OIS. Ensure that only information for the addressee is included in the packet to avoid a PII violation. Make sure that you have made a separate packet for each cc recipient; and that you have selected all attachments on the Transmittal.

Step 8: **Check the time –** Please do not send a document to the OCC after 4:00pm PST.

Step 9: **Email it.** Create an email with the recipient as <u>OWCP-Printer-Mail-DEEOIC</u>. **The subject should include the Case ID and any other distinguishing factor you choose. If you are sending multiple emails for one case you'll need to provide a different subject**

for each (i.e. 123456 for C1). If you have multiple letters related to one claimant you should send those as separate attachments in one email. For example, letters to the claimant, doctor, and AR should be included in one email. Letters to multiple claimants cannot be combined into one email. All documents sent to OCC will be maintained by the contract staff until a future retention period is determined.

The contractor will review your documents and if one of the following errors is found they will not process any of your documents in that email. The contractor or a government representative will return your email to you identifying the error as follows:

- a. "Your document(s) cannot be mailed because there is no transmittal and address page included or the transmittal/address page is incomplete."
- b. "Your document(s) cannot be mailed because the Case ID Number on the Transmittal does not match the Case ID Number on the letter."
- c. "Your document(s) cannot be processed because the address on the address label does not match the address on the letter."
- d. "Your document(s) cannot be mailed because the address(es) on the address page and/or letter is incomplete."
- e. "Your documents cannot be processed because they are missing the full address for the courtesy copy on the letter."
- f. "Your document(s) cannot be processed because there was no letter/RD attached."
- g. "Your document(s) cannot be mailed because the courtesy copy name and address is not located in the correct position at the bottom of the letter."

If other errors are identified a government representative will email you to notify you that all of the documents in the email will not be processed.

REMINDERS:
1) Be sure you have proofread the document before printing. In the very rare instance that you find you've printed a document in error, follow the job-aide "How to Recall a Document Before it is Mailed". The job aide can be found at http://esa.esa.dol.gov/owcp/deeoic/NAT/centralized_printing/Centralized_Printing.htm
2) Each document is printed under one transmittal sheet and address page, so it is important that you don't 'batch' multiple recipients under the same transmittal sheet, with the exception of one AR on a case that has multiple claimants.

Revisions:

1.0 – 6/29/15 – establishes revision and change the text to apply to emailing documents rather than sending them directly to the printer.

1.1 – 8/4/15 – Changed all reference from Energy Centralized Printing (ECP) to Outgoing Correspondence Center (OCC) for Energy; changed Step 1 to say add address for any courtesy copy recipient; added to save the document as a .pdf with naming protocol; added Note in Step 4 saying if there is an AR for multiple claimants on one case the letters can be merged for emailing purposes; in Step 9 added statement of retention; expanded the naming convention definition.

1.2 – 8/31/15 – modified Step 9 to include multiple documents added to one email; added Note after Step 10

1.3 – 11/9/15 – in Steps 2, 6, and 9 removed requirement for naming convention; eliminated Step 10; added information in Step 5 to include information on special mailing instructions; updated Step 9 to identify the errors where the contractor will not process a document

1.4 – 2/10/16 – updated Step 9 to show that all documents will be returned if there are errors, and the specific responses the contractor will send.

1.5 – 8/12/16 – changed Step 8 to reflect that nothing should be sent to OCC after 4pm PST